

Financial App Form

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Name: LeRoy Gutekunst

Name of the nursing home: Houghton Rehabilitation & Nursing

Date Of Birth: 1936-06-27

What is your Medicaid ID #: DR03236D

Your Home Address

Street Address: 5638 Homestead Rd.

Address Line 2:

City: Hamburg

State/Region/Province: NY

home_postal_zipcode: 14075

Spouse

spouse info: Never married

Demographics

you selected: Veteran

Employment status: retired

Real Estate and Vehicles your home info within the past 5 years

Living with someone rent free: Yes

equity value of your home:

your monthly bill:

Own vehicle sell info in past 5 years

Make and Model: 2018 Ford Escape

Fair market Value: 11804

Insurance Info

Name of Homeowners insurance:

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

Life Insurance (including through an annuity): Yes

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Medicare #: 8ED1-TD3-UD13

Life Insurance provider: Wilton Reassurance Life Company of NY

Cash Value: \$86281

Policy #: 000013283A

Your Income Info Social Security

Name of payer: Social Security Administration

Amount: 1330.70

Frequency: Monthly

Pension

Name of payer: State Street Retiree Services for USPBGC Bethlehem Steel Corp Pension Plan

Amount: 243.62

Frequency: Monthly

Pension

Name of payer:

Amount:

Frequency:

Annuity

Name of payer:

Amount:

Frequency:

IRA distribution

Name of payer:

Amount:

Frequency:

Stock Dividends

Name of payer:

Amount:

Frequency:

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TRUST INFO

Trust name:

Garantor:

Trustee:

Amount:

Your Investments Stocks

Company Name: Wells Fargo Advisors (NOTE: not just stocks)

Approx. Value: 14,098

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name:

Approx. Value:

Banking info Bank #1

Bank: Evans Bank

Account #: *****21

\$ Amount: 6535

bank_1_date_closed:

Bank #2

Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Bank #3

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Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Funeral Info

Irrevocable prepaid burial setup

Funeral Home

Name: Loomis, Offers & Loomis, Inc.

Price: 6033.33

Best Contact

Name: Kayann Taylor

Email: kayann.taylor98@houghton.edu
